

Sample Processing Guide for Archival Materials in Town Clerk's Office

Note: We put together this guide for volunteers working on our home town's records. There are many variations in archival techniques, including labeling, so do not take the information in this document as the only way, or even the best way, to proceed. Just try to be consistent.

Introduction

The intention of this *Guide* is to assist volunteers and staff members working on the Town's archival materials. We hope they will augment and amend the *Guide* as needed to provide additional guidance to new volunteers and staff.

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PROCESSING (arranging and describing archival materials)

SPACE & SUPPLIES

Minimum requirements are: clean table, chair, space or separate table or counter to put boxes or volumes. Have on hand a notebook to take notes while reviewing the records – the arrangement, condition of materials, notable documents, where you have stopped for the day. You will need access to a photocopier.

- Typical archival supplies to have on hand are: archival quality records storage boxes (12 x 10 x 15); letter size document boxes and folders; legal size document boxes and folders; letter size archival quality paper for photocopying or interleaving; labels for boxes, stainless steel paper clips if necessary to hold sheets together, a bone folder to assist in flattening paper that has been folded, cotton tying tape for any bound volumes whose spines or covers are loose, and appropriate erasers.
- Also have on hand ordinary manila folders (old used ones are fine), #2 pencils, 18 inch ruler to hold one's place when putting folders in a storage box.
- Will other preservation measures be required *e.g.* copying, photocopying? If some items are badly damaged or brittle, record in your notebook and "house" carefully. They *may* be priority items for professional conservation treatment or more likely, for photocopying and scanning to reduce handling of the original.

LOOK at the WHOLE

- Look for "logical" groupings - materials used for the same purposes: types of records, arrangement.
- Check any labels or jottings on covers or folders or the endorsements on the back of tri-folded documents for dates, contents, owner, creator, or receiver of the materials. *Do not throw out any documents. Set aside if you do not think it need be retained until a processing scheme has been agreed upon.*
- Examine bound volumes carefully - are they used for the same purpose throughout? What are those purposes? What is the date range? What function created and / or maintained them?
- Take notes about what you find; you are trying to get a handle on what the collection contains - and what it doesn't or is missing. (Use a notebook for this purpose throughout the project).

- Talk over what you have found with someone else. Describe how you want to arrange the materials, IF you cannot re-establish original order. Does it make sense to the other person?

Basic rules when using or processing archival materials.

NO food or drink in the area -

They can stain and damage records and they attract insects

NO pens - use only #2 pencils

NO scotch tape on documents or bound volumes

NO post-its on documents or pages of bound volumes

Handle all materials with care

– Be especially careful in handling brittle or damaged materials

– Do not prop a bound volume against table as may damage binding

TIME TO SORT

- Write out your plan for sorting and arranging. Make your piles according to your plan.
- Five (at least) ways to group materials:
 - 1) recreating or duplicating the original “order” or filing system
 - 2) by original function or use of the materials
 - 3) chronological order you impose
 - 4) by similarity of content (e.g., papers, photos, etc. relating to a single event)
 - 5) by format (e.g., photographs, maps, other oversize materials)

Note: most sorting will combine several of the above
- Unfold, flatten paper, remove rusty paper clips and staples.
- Examine condition of materials. You may need to photocopy newspaper clippings onto archival quality paper. You may wish to retain originals IF they are intrinsically valuable. Note that you have made copies and indicate in finding aid when it is written.

- Place materials in uniform size archival quality folders. For older, more fragile paper, place only a few sheets in each folder. For more recent, typed, voluminous records, use the score lines at the base of the folder as your guide. “Corner” the folder by folding along one of the score lines. Then insert the sheets, no more than fit comfortably without causing the folder to bulge.

☛ Tip: If ordinary used folders are available, you may wish to use them first when working on a more complicated and large collection, noting info. Then, once sorting complete, move contents to archival quality folders.

- Label folder tab in pencil, printing neatly the Record Group Name and Number, and sub-group, if any, in the center; folder title and date or date range on right. Please note that dates are printed year month day order e.g. 2008 Mar 25 or 2008 Mar if the contents represent a full month of documents. *See next page for additional information.*

☛ Tip: During sorting, it is easier to use one cubic foot records storage boxes than the smaller document boxes. To keep your place, use an 18 inch ruler standing upright or a sheet of paper or folder standing upright to mark a new year, or letter of the alphabet, or some other change in an arrangement.

Labeling folders.

Print neatly with #2 pencil on folder tab --

Center:	Record Group Number and Name, Name of Sub-group if several hierarchal levels.
Right:	Folder title, if necessary; date range within folder. Examples: 1856 - 1858; 1899 May 24
Left:	Box and folder number (not done until processing completed)

Examples

1 / 1	RG 4 Schools School Registers	All Districts 1860
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1 / 2	RG 4 Schools School Registers	East District 1867
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Town Clerk
xxx, xx

If there will be many folders in a particular collection, order a rubber stamp and stamp name on the folders. Also you may wish to stamp the front flap of each folder with the Town Clerk stamp as shown above (stamp lots of empty folders and have them on hand). Occasionally, it may make sense to note the number of items in a folder. For the School Registers, for instance, the number of booklets in a folder has been noted on the front flap, bottom right with a slash and the number – *example* / 6

Other materials

- Small bound volumes may be boxed.
- Most bound volumes, however, will likely remain stored flat on the shelving if larger than 11 x 14 or upright if 11 x 14 or smaller. Provide identifying information on strips, made by cutting up archival quality folders: Record Group Number and Name; Subgroup Name, if any; Title of Volume or “no spine title”; Date Range. Insert strip inside the front cover.

BOX THE FINISHED COLLECTION

Once the sorting and foldering of unbound records is completed, most collections will go into document boxes.

- Box folders in the order you have decided upon, taking notes as you proceed. You will need them for your finding aid.
- Folders should stand upright in boxes, but not so tight that they are difficult to remove. Lift a folder halfway; it should not fall back into the box.
- Once folders are arranged in the boxes, remove each one and add the box and folder number on left hand side of each folder tab.
- Then label the boxes. Either type identifying information on the 4 x 3 labels provided, or use a computer and set up template for 4 x 3 inch labels. Insert in label holders that are placed at end of the document box. See next page for illustration.

Center on each label: Record Group Number and Name, Title of the Records, Date Range. Also indicate date range or alpha range included within the given box. Provide its box number, 1, 2, 3, *etc.* If the collection will not grow, indicate the total number of boxes *i.e.* Box 1 of 4, Box 2 of 4, *etc.*

When the “permanent” location of records is determined, labels for additional archival collections can have location number also on bottom right of the label.

Sample label

<p>RG 1 Town Clerk</p> <p>Highway Records Street Layouts 1832 - 1943, 1955 A-K</p> <p>Box 1 of 2</p>



Center label --
On end with pull string on document box



On one end of records storage box
below handhold

PREPARE THE FINDING AID

- Remember that a Finding Aid has (at least) three purposes:
 - (1) Help staff to find records or information to answer customer requests, and to encourage research and educational use of the materials
 - (2) Help a researcher find needed records or information
 - (3) Reduce unnecessary handling of materials in the effort to find needed records or information

- Gather all your notes and use them in preparing the Finding Aid. You may still need to look at specific records but most of the work will have already been done. Keep in mind the 5 W's - who, what, where, when, why – as you prepare a Finding Aid

- Elements of a Finding Aid include:
 - (1) **Record Group Number and Name; Name of the Collection.** *See next page for a draft list of Record Groups.*
 - (2) **Historical or biographical sketch** – A brief description to put the collection into context. What was the function, purpose of the entity that created or collected the records?; when did it come into existence?; why do the records exist?
 - (3) **Scope and Content.** A description of the collection itself – date range, size, how the collection is arranged, what is of particular significance within the collection, what is missing that people might expect to find,

where else should someone look for related or similar information. If the collection has several separate subgroupings, list them.

(4) **Additional description** (if necessary). If there are several large subgroupings, supplement the *Scope and Content* by writing brief descriptions for each of subgroups.

(5) **Container list** (if necessary). In most instances, the list will consist of the box and folder number, folder title, and date.

- Print a hard copy of the Finding Aid and keep readily available in Town Clerk's Office; give copies to the Library and Historical Society for their own and their researchers' information.

Draft Record Groups [RG] for Historical Records

Note: these sub-group do not relate to Westford's holdings

RG 1 Town Clerk

- Town Record Books
- Personal Mortgages
- Payments to Treasurer
- Land Records
- Highway Districts [maybe belongs w/ RG 2 Assessment & Collection]
- Jury Proceedings Meetings
- Annual Town Reports

RG 2 Assessment and Collection

- Tax and Financial Records
- Collector's Deeds

RG 3 Treasurer

- Cash Book

RG 4 Schools

- School Registers
- School District Records
- Financial Accounts

RG 5 Ancient Town Papers By year. May contain:

- Bills and receipts** for goods & services. May include Town Farm, poor, sick, elderly, bounties on foxes, crows, abatements, road and bridge work, pay or reimbursements to town officials, damages, schools, State and County taxes, etc.

Assessment & Collection documents

- Inventory of polls and ratable estate
- Tax warrants, payments
- School tax

Legal documents

- Attachments
- Deeds
- Writs, summonses, arrest warrants
- Other Legal Agreements

Militia

Certification of militia service
Musters

School documents

Meeting Minutes
Reports of Superintending Committee

Town Meeting / Election documents

Notification of Town meeting
Petitions
Town meeting warrants, votes
Voter checklists

RG 6 Historical Collection [non-record materials of historical value]

A Guide to Officers of Towns, 1847, 1859

Biennial Report of Commissioners of Lunacy, 1897-1898

Boston Post Cane

Bicentennial Flag